



**PUBLIC AUTHORITY PENSION SERVICES LIMITED**

## **Pensions Training Course**

**22<sup>nd</sup> & 23<sup>rd</sup> May 2024**

Purchase & Transfer of Retirement Benefits  
Under the Single Public Service Pension Scheme  
(Circular 15/2019)



## PUBLIC SECTOR PENSIONS TRAINING COURSE

### PURCHASE & TRANSFER OF RETIREMENT BENEFITS UNDER THE SINGLE PUBLIC SERVICE PENSION SCHEME

This 2 x half-day training course focuses on Circular 15 of 2019 which provides details of a facility introduced to allow Single Scheme members to purchase additional retirement benefits and also provides a facility for members to transfer retirement benefits accrued in certain other Revenue approved Schemes and PRSAs into the Single Scheme. The course will cover the features of both the purchase and transfer facilities, the calculation of limits of additional benefits that may be purchased under each facility and the associated cost to purchase additional benefits. The course also covers the administration of Circular 15/2019, including the forms to be completed by both the administrator and the member.

#### Course Dates

The course comprises 2 half-day modules which will be held on the mornings of **Weds 22<sup>nd</sup> & Thurs 23<sup>rd</sup> May, 2024.**

#### Course Fees

The cost of the 2 x half-day course is €450 per person. Where two or more people from the same organisation book places on the course, the cost is €420 per person. No VAT is payable on training.

#### About PAPS

Public Authority Pension Services Limited (PAPS) provide a comprehensive range of technical pensions expertise and administrative support services to those responsible for the management and administration of Public Sector Pension Schemes. The PAPS team has many years of experience, both in actual public sector pension scheme administration and in providing support and information to public sector bodies to assist them in the administration of their own schemes. As part of its support services, PAPS develop and present training courses for administrators of Public Sector Pension Schemes. More than 600 attendees have participated in PAPS' training courses from 2019 to date.

#### Online Training – attend from anywhere

The course will be delivered remotely using MS Teams. The app allows the host to share their presentation with the attendees and allows for the attendees to ask questions using their microphone or by chat/messaging. All courses are delivered live and are not recorded.

#### Reserve your place

To enroll in this training course, please complete the attached booking form and return it to [info@paps.ie](mailto:info@paps.ie) no later than **Wednesday 1<sup>st</sup> May, 2024.** Due to a limited number of places on the course, a booking cannot be finally confirmed until the required fee is received.

On receipt of the completed booking form, confirmation of your place on the course will be issued and an invoice will be forwarded to you shortly thereafter. Course bookings are final once confirmed and will be invoiced even in the event of non-attendance.

PAPS operate a strictly “no refunds” policy. Neither is a credit for future courses available in the event of non-attendance. However, it will be possible for another person from the organisation to attend in the event of the nominated person being unable to attend the course.



## PUBLIC SECTOR PENSIONS TRAINING COURSE 22<sup>nd</sup> & 23<sup>rd</sup> MAY 2024

### PURCHASE & TRANSFER OF RETIREMENT BENEFITS UNDER THE SINGLE PUBLIC SERVICE PENSION SCHEME

This course is delivered live to enable questions and answers throughout. Training sessions are not recorded.

Date	Brief Description of Topics Covered
<p><b>22/05/2024</b> 09.30-13.00</p>	<p><b>Module 1 - Calculation of limits &amp; costs of additional referable amounts</b></p> <ul style="list-style-type: none"><li>• The main differences between purchase under the Pre-Existing Schemes and purchase under the Single Scheme</li><li>• The Single Scheme Purchase Facility, including eligibility requirements and limits</li><li>• The Single Scheme Transfer Facility, including eligibility requirements and limits</li><li>• The cost of purchase</li><li>• Refunds and reduction of amounts purchased</li><li>• The treatment of purchased amounts in relation to specific benefits</li></ul>
<p><b>23/05/2024</b> 09.30-13.00</p>	<p><b>Module 2 - Administration of Circular 15/2019</b></p> <ul style="list-style-type: none"><li>• DPENDR toolkits</li><li>• Notice &amp; Contract periods</li><li>• Forms for completion</li><li>• Purchase Facility process map</li><li>• Transfer Facility process map</li><li>• Finalising processes &amp; payments</li></ul>



## THE PAPS TRAINING TEAM

### **Caroline Hickey** - **Managing Director**

Caroline began working in the Life and Pensions industry in 1999. She worked in Keane Pension and Investment Consultants Limited for 12 years where she developed extensive technical expertise in all areas of Private Pension Planning, Investments, Group Risk Schemes and in areas of Public Sector Pensions through the provision of advice in relation to AVCs and PNS.

Caroline joined Public Authority Pension Services Limited (PAPS) as a Director in June 2016 and became Managing Director in December 2019.

Caroline holds a Diploma in Information Systems from Trinity College Dublin and has held a Professional Diploma in Financial Advice (QFA) and a Professional Diploma in Retirement Planning Advice (RPA).

### **Caitriona Darcy** - **Account Manager**

Caitriona joined PAPS as an Account Manager in 2022 and has developed technical expertise in public sector pension scheme rules, with a focus on the Single Public Service Pension Scheme.

Caitriona has more than 13 years' experience in the Financial Services industry and brings to her role in PAPS excellent communication skills as well as experience in documenting and breaking down complex processes. With a keen focus on quality and compliance, Caitriona strives to deliver first-class service to the bodies PAPS works with.

### **Samantha McLoughlin** - **Account Manager**

Samantha joined PAPS as an Account Manager in 2023 and has developed technical knowledge and expertise in the Single Public Service Pension Scheme.

Samantha had responsibility for the preparation of Single Scheme benefit statements in advance of the 30th June statutory deadline in 2023. With more than 14 years' experience in the Insurances and Financial Services industries, Samantha uses her administration experience and excellent communication skills to assist clients with the administration of their schemes. Samantha is working toward the Qualified Financial Advisor (QFA) qualification, having obtained her APA in 2022.

### **Sarah Darcy** - **Director**

Sarah joined PAPS as a Senior Account Manager in 2019, and brings with her a broad range of technical knowledge across public and private sector schemes. Sarah has worked in pensions since 2007; prior to joining PAPS she was the Superannuation Officer for the National Maternity Hospital. Sarah has hands-on experience of administration of pre-existing schemes and the Single Public Sector Pension Scheme.

In the earlier part of her career, Sarah worked in the banking sector. During this time she worked in the Learning & Development team of one of Ireland's largest banks. Sarah has extensive experience in delivering staff presentations and training, both in traditional classroom format and online.

Sarah holds a number of professional qualifications including: a Professional Diploma in Financial Advice (QFA); a Professional Diploma in Retirement Planning Advice (RPA); a Professional Certificate in DC Pension Scheme Trusteeship (PTP); Certified Project Management Associate (IPMA-D), and a QQI Level 6 Certificate in Training Delivery and Evaluation.

### **Kimberley Tanoh** - **Account Manager**

Kimberley joined PAPS as an Account Manager in 2023 and has developed particular expertise in the Single Public Service Pension Scheme. Kimberley had responsibility for the preparation of Single Scheme benefit statements in advance of the 30th June statutory deadline in 2023. Prior to joining PAPS, Kimberley developed key skills in roles within the Pension and Financial Service industries. Through her excellent communication skills and attention to detail, Kimberley delivers optimal service to clients. Kimberley is working toward the Qualified Financial Advisor qualification.



## Feedback from 2019 & 2021 Purchase & Transfer courses - participant comments

*"Great training course. Extremely practical."*

*"Found course very useful."*

*"Very knowledgeable presenters."*

*"The training was very informative and delivered in an easily understood way."*

*"The course content was very comprehensive and informative - as a relative newbie to pensions administration I can see myself making very good use of the handouts.... Thank you for a very well presented course."*

*"Very clear documents given before the course and useful information and plenty of time for Q&As. Sarah and Caroline were friendly, approachable and clear in their teachings. Thanks a lot."*

For more information or to reserve your place, please contact: [info@paps.ie](mailto:info@paps.ie)